

**Local Education Agency Medi-Cal Billing Option Program
Ad Hoc Workgroup Meeting
October 5, 2011 Meeting Minutes**

Location: Natomas Unified School District (USD)

1.	Geri Baucom	DHCS, Safety Net Financing Division (SNFD)
2.	Rick Record	DHCS, SNFD
3.	Martin Alvarez	DHCS, A&I Financial Audits Branch (FAB)
4.	Cori Miglietto	DHCS, A&I FAB
5.	Linda Davis-Alldritt	California Department of Education (CDE)
6.	Shalonn Woodard	CDE
7.	Matthew Hill	CDE, Special Education
8.	Steve Perez	CDE, Special Education
9.	Anysia Drumheller	Butte County Office of Education (COE)
10.	Maureen Carl	Contra Costa COE
11.	Michelle Cowart	Contra Costa COE
12.	Lisa Chaney	Fresno COE
13.	Roni Tunick	Los Angeles COE
14.	Margie Bobe	Los Angeles USD
15.	Sherry Purcell	Los Angeles USD
16.	Laura Baynham	Mendocino COE
17.	Tracy Cole	Natomas USD
18.	Jeremy Ford	Oakland USD
19.	Cathy Bennett	Sacramento City USD
20.	Cynthia White-Piper	San Bernardino City USD
21.	Marlene Burrue	San Joaquin COE
22.	Greg Englar	Sonoma COE
23.	Janice Holden	Stanislaus COE
24.	Kevin Harris	Navigant Consulting, Inc.
25.	Gloria Eng	Navigant Consulting, Inc.
26.	Kerry Chang	Navigant Consulting, Inc.

Handouts

Each participant was e-mailed an electronic copy of the Workgroup Meeting Agenda and August 2011 Meeting Minutes. A copy of the Flowchart of the PPA/Annual Report was also passed out to Workgroup members.

Purpose

The meeting was convened by DHCS. The purpose of the Workgroup is to improve the Local Educational Agency (LEA) Program. The emphasis of the meeting is to strategize various goals and activities aimed at enhancing the Medi-Cal services provided on school sites and access by students to these services, while increasing federal reimbursement to LEAs for the cost of providing these services.

Review of Meeting Minutes

The Workgroup reviewed the minutes and discussed the A&I one percent withhold and had no changes to the August meeting minutes and was approved as written. The minutes will be posted on the LEA Program website.

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California Department of Education (CDE) Update – AB 3632 Discussion

- Steve Perez and Rick Record provided a brief update on the Transitional Workgroup for AB 114.
- SNFD presented information about the LEA Program at the August 17, 2011 Transitional Workgroup meeting.
- The LEA Program could potentially be an option to provide Medi-Cal funding for mental health services provided in schools.
- SNFD prepared a handout of the mental health services provided under the LEA Program which highlights: eligibility requirements (beneficiary and LEA provider), services reimbursable under the programs, service limitations, claims and reimbursement, and the claims reconciliation process.
- CDE is providing guidance on their website for potential providers (<http://www.cde.ca.gov/sp/se/ac/ab114twg.asp>) and questions may be submitted via email at twg@cde.ca.gov.
- LEA Program information is posted on the CDE website to help provide an overview of the LEA Program.
 - The information on the website is not intended to be a full description of the entire LEA Program.
 - The Workgroup requested the LEA Program website link be added on the CDE website so schools can access all policy and program information.

DHCS SNFD Update

Staffing Updates

- SNFD has filled the Staff Services Analyst position and Cheryl Ward will start on October 17th.

2011 LEA Training

- The LEA Program Training Webinar will occur on Friday, October 7, 2011 from 9am-1 pm.
 - The Workgroup expressed concern that the Webinar start time on the registration and invitation was 8am and incorrect.
 - SNFD will resend the invitation information to registrants with the correct start time.
- SNFD sent the training announcement via a SELPA email and announced it at the AB 114 Workgroup meeting.
- LEAs can register online for the LEA Program Training at the LEA Program website.
 - Over 225 people registered for the LEA Program Training thus far.
- There will be five training topics which include information about the LEA Program, LEA Provider Participation Agreement/Annual Report requirements, reimbursable services, LEA billing requirements and CRCS form updates and audits.
- LEAs will be able to submit questions during the Webinar and SNFD and A&I will field as many questions after each section.

Provider Participation Agreement (PPA)/Annual Report Process and

- SNFD worked with CDE and Provider Enrollment Division to revamp the PPA/Annual Report and process so that the Annual Report is part of the PPA.

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- In prior years, LEAs were only required to complete a PPA when the LEA first enrolled as an LEA provider and subsequently submitted an Annual Report. Effective FY 2011/12, all LEAs will be required to submit an annual PPA/Annual Report to certify to the requirements of participating in the LEA Program and as an LEA provider.
- The PPA/Annual Report is available on the LEA Program website and is an Excel document with separate worksheets of the PPA/Annual Report.
- The PPA/Annual Report is due November 30th (the same due date for the CRCS forms).
- A PPA/Annual Report Process Flow Chart has been created to help LEAs understand roles and responsibilities of LEAs, CDE and DHCS. In addition, a PPA/Annual Report checklist has been included to assist LEAs.
- The Workgroup discussed the concerns of the “authorized signor” and title of the school personnel who are signing the PPA/Annual Reports. In addition, electronic claims submissions are being held up at HP/ACS due to signature of the “authorized signor” at the LEAs.
 - Example, ACS is not accepting the title of “Chief Business Officer”.
 - SNFD will research this issue with ACS.

HP/ACS Transition

- The final stages of the transition from HP to ACS have started and the Assumption of Operations took place on September 30, 2011; however, there is an anticipated 30 day lag in the transition of functions.

RAD Code 9921 (Annual Assessment)

- The OIL to update the utilization control for IEP/IFSP assessments is effective for dates of service beginning July 1, 2009. The paid claims system fix was implemented on September 26, 2011. The EPC implementation is yet to be determined.
- SNFD obtained the scope of RAD code 9921 denials from FI-COD/HP.
- SNFD has early claimed RAD code 9921 denials with dates of service beginning July 1, 2009 through September 31, 2009, so SNFD could reimburse LEAs for legitimate claims.
 - SNFD plans to continue to early claim RAD code 9921 denials until the EPC is implemented.
- SNFD and Navigant reviewed and analyzed RAD code 9921 denials and identified there are erroneously denied claims that should be legitimately reimbursed to LEAs and other claims that should not be reimbursed and were properly denied.

LEA IRUS Update

- The FY 2009/2010 IRUS was posted on the LEA Program website on September 13, 2011.
- Effective for the FY 2011/12 CRCS, DHCS will no longer provide the IRUS reports to LEAs.
 - All LEAs are required to document and track their own units, encounters and reimbursement information for LEA paid claims.
- The Workgroup discussed the difficulties of tracking reimbursement information since LEAs typically do not reconcile between submitted claims and claims reimbursed because of the volume of claims.
- The Workgroup also discussed the current monthly CP-O-888 Report that LEAs receive.

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- SNFD will look into the CP-O-888 Report and discuss the feasibility of modifying the report.
- SNFD will discuss with FI-COD and determine if there are reports that LEAs might request from ACS to help track their own units, encounters, and reimbursement. Reports may be at a cost to the LEAs.

SPA 05-010

- The speech-language equivalency SPA was re-submitted to CMS on September 20, 2011.
- The CMS 90-day response clock has started and CMS has until December 19, 2011 to formally respond back to SNFD.

2009 and 2010 LEA Legislative Report

- The 2009 Legislative Report was resubmitted to the Legislative Office at DHCS after the legislative analysts had some suggested clarification points. There is currently a version posted on the LEA Program website.
 - The version will need to be updated on the LEA Program website.
- Minor edits to the 2010 Legislative Report are also being made and will be submitted to the Legislative Office at DHCS for their review.
- The Workgroup discussed when LEAs can access the report, but SNFD clarified that the report is made public only after it is signed and released from the Governor's Office.

SACS Code 5640

- SNFD is still drafting the Policy and Procedure Letter (PPL) for the SACS Resource Code 5640.
- The PPL will provide additional guidance to LEAs since the impact on the LEA Program is different from the MAA Program.
- The FY 2009/10 CRCS forms and instructions reflect that expenditures classified under Resource Code 5640 (Medi-Cal Billing Option Program) are not considered to be restricted federal funds and may be included on the CRCS form.

LEA In-Box

- All LEA questions can be submitted to the LEA inbox at LEA@dhcs.ca.gov.
- The LEA Program website subscription notification process has been activated and an email notification will be sent to subscribers when the LEA Program website has been updated.
 - The Workgroup requested that the email notifications have the entire link that directly links them to the updated information (as opposed to the general LEA Program website homepage).

Audits & Investigations Updates (A&I):

Staffing Update

- In addition to Martin, Cori and Debbie, five new auditors are staffed on the LEA Program. A&I has interviewed for additional positions, but still have yet to fill the vacant positions.
- The newly hired auditors will be training through mid-November before starting on CRCS audits.

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A&I Audits

- A&I has three years from date of CRCS submission to audit.
- A&I will conduct minimal, limited and field audits. LEAs will also receive a 15-day exit letter at which point LEAs may submit additional documentation to be considered by auditors. At the conclusion of the audit, A&I will issue an audit report to LEAs.
 - The Workgroup expressed concerns regarding the timing of A&I sending the 15-day exit letters because of school summer and winter breaks.
- The Workgroup also discussed who the best LEA contact would be to send the exit letters and audit reports.
 - A&I may use the current PPA/Annual Report contact list or the CRCS contacts as a source. However, due to school personnel turnover, the CRCS contact may no longer be working at the LEA.

CRCS Form Updates

- The Workgroup discussed the new CRCS form changes for FY 2009/10.
- A&I discussed the need for reporting all qualified practitioners and discussed the sample bridging document on the A&I website that will assist LEAs pull all practitioner costs information.
- A&I will be discussing CRCS form changes in the LEA Program Training Webinar.

Sub-Committee Reports

Training Subcommittee

- The October LEA Program Training is scheduled for October 7th from 9am-1pm.
- SNFD, A&I and Navigant will present different sections of the training focusing on general LEA Program policy and billing information, PPA/Annual Report updates, and CRCS forms and audit processes.
- The Training Subcommittee reviewed the training presentation and provided some feedback that has been incorporated.
- The training will be recorded and posted on the LEA Program website.

Services Subcommittee

- The Services Subcommittee received an updated potential new services matrix from Navigant, which summarized the results of their selected state interviews.
- The Services Subcommittee discussed using the IEP/IFSP as the plan of care for Targeted Case Management (TCM) services, instead of having TCM identified as a service in a student's IEP/IFSP.
 - The Workgroup expressed that TCMS is rarely listed as a service in an IEP.
 - The Workgroup believes that TCM is difficult to document and this is a reason why TCM reimbursement has decreased over the years.
 - SNFD to research TCM and discuss with the Services Subcommittee.

Next Meeting

Wednesday, December 7, 2011 10:30am-3:00pm at Natomas USD